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Foreign Crops and MARKETS



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L A T E N E W S

Argentina's first official estimate of the probable grain acreage seeded for the 1945-46 crop indicates reduced areas seeded to wheat, oats, and rye with a small increase in the barley acreage. The seeded area is placed, in thousand acres, with the previous year's seeded acreages in parentheses, as follows: Wheat 14,127 (15,369), oats 4,067 (4,927), barley 2,254 (1,862), rye 3,504 (3,979), and flaxseed 4,559 (4,847).

The Philippine rice supply is limited and prices are substantially above the prewar level. Estimates indicate that the best rice growing Provinces will have crops amounting to about 60 percent of normal because of the destruction of paddies, killing of work animals, and the scattering of labor. The harvest normally begins in November and this year will be later than usual. The hope was expressed that substantial quantities of rice could be made available from French Indo-China and Siam.

Danish crop conditions as of September 1, 1945 expressed as percent of normal, with corresponding figures for 1944 shown in parentheses, were announced as follows: Wheat 96 (99); rye 90 (97); barley 95 (100); oats 97 (99); mixed grains 97 (99); legumes 95 (96); potatoes 95 (86); mangels 96 (83); fodder sugar beets 96 (83); rutabagas 96 (87); turnips 96 (88); carrots 94 (85); sugar beets for feed 96 (83); sugar beets for sugar 99 (87); lucerne 100 (93); and pastures 103 (89).

Soviet Russia in an agreement with Rumania has undertaken to provide the latter with 165,000 short tons of wheat and 165,000 short tons of corn, to be returned in kind during 1946-47 with 5 percent interest. The agreement was negotiated in order to alleviate the results of the severe drought and the bad harvest in Rumania this year, it was stated. The amount of food and feed grains required by Soviet troops in Rumania was reduced. With respect to reparations payments of grains by Rumania, the agreement provided that other products may be substituted and that deliveries of the balance due may be postponed until next year's harvest in Rumania.

Uniform Italian rations for bread and related starches were announced on September 17 by the Italian Government and the Allied Commission. The new rations will become effective October 1. Normal consumers will have 200 grams of bread daily and 2,000 grams of pasta or rice monthly. This increases the basic bread ration in northern Italy from the existing 150 grams daily, but leaves the ration in southern Italy unchanged. The supplemental rations for heavy workers and farm hands will be 100 grams of bread and 20 grams of other starches daily. For very heavy workers the supplemental rations will be 200 grams of bread and 20 grams of other starches. Miners and forest workers are to receive a supplementary ration of 400 grams of bread and 20 grams of other starches. The Italian press reports that the success of the new rations will depend in large part on deliveries of grains by producers to collection centers.

WORLD BARLEY CROP REDUCED, OATS INCREASED

The 1945-46 world production of barley is estimated to be about 2 billion bushels, a decline of 6 percent from 1944 and 13 percent less than the 1935-1939 average. The oats crop of about 4.3 billion bushels is 5 percent more than a year ago but slightly less than the prewar average. The reduced barley crops, particularly in Europe, North Africa, and Canada, are having a direct effect upon the international trade position for this grain in 1945-1946; the increase in oat supplies, however, is largely the result of the record crop in the United States and will have only a limited effect upon the world situation for oats.

The crop outturns for barley and oats stand somewhat in contrast in the United States with a small decrease for barley and a sharp increase for oats. In Canada, however, both oats and barley show declines below either of the past 2 years. Only limited quantities of these grains are likely to be exported during the current season, as compared with exports of around 40 million bushels of barley and 85 million bushels of oats in 1944-45. Canada has been the chief exporting country of these grains in recent years.

Europe has smaller harvests of both barley and oats in 1945 than in any other war years, though the decline from last year does not appear as great as for the bread grains, wheat, and rye. This results in part from generally maintained or slightly increased acreages, especially in western and northern Europe following the reductions in fall seedings of bread grains. Declines were generally recorded in eastern Europe, particularly eastern Germany, as a result of the disruptive effects of land reform, population shifts, and requisitioning of livestock, especially draft power. In the Mediterranean area a severe drought reduced harvests.

Some increase in acreage and production of both barley and oats is indicated for the Soviet Union for 1945, as compared with the past 2 years, though outturns are estimated to be below the 1935-1939 average. No allowance has been made in the case of the Soviet Union for European areas that have been annexed, that is, Bessarabia, northern Bukovina, Ruthenia, eastern Poland, the Baltic States and parts of Finland, which normally produced before the war around 75 million bushels of barley and 125 million bushels of oats. The European totals would be correspondingly smaller and the Soviet Union estimate larger, if the harvest figure for these areas were shifted. All estimates included, however, are on the basis of 1937 boundaries in order to facilitate comparison.

The drought sharply reduced the harvests in French North Africa, especially of barley in Morocco and Algeria, and greatly contributed to the food deficit position of that region. The unavailability of significant quantities of barley for import has increased in turn the requirements of wheat inasmuch as barley is extensively used for food. The barley crop in Egypt and the Middle East was reported generally above a year ago. Except for Iraq, however, production is largely confined to domestic utilization.

Barley: Acreage, yield per acre and production in specified countries, average 1935-39, annual 1943-1945 a/

Continent and country	Acreage b/			Yield : per acre:			Production		
	Average : 1935-39	1943	1944	1945 prelim.	Average : 1935-39	1943	1944	1945 prelim.	
North America:	1,000	1,000	1,000	1,000	Bu- shels	1,000	1,000	1,000	
United States	10,816	14,768	12,359	10,606	22.1	238,616	284,426	277,697	
Canada	4,291	8,397	7,291	7,351	20.7	88,882	194,712	161,135	
Mexico	374	-	-	-	10.3	3,858	-	-	
Estimated total	15,480	23,550	20,050	18,360	-	331,360	483,640	443,430	
Europe:	934	1,786	1,973	(2,225)	39.2	36,596	76,583	(88,800)	
United Kingdom	118	209	168	(165)	46.2	5,455	8,776	(7,800)	
Ireland	(4,152)	3,897	(3,830)	-	19.3	(80,235)	65,373	(55,000)	
Spain	177	267	(270)	(280)	10.1	1,784	1,824	(1,380)	
Portugal	13	65	71	-	33.1	430	(2,650)	-	
Switzerland	488	669	-	-	20.9	10,215	10,270	6,338	
Italy	(4,101)	-	-	-	41.3	(169,230)	-	-	
Germany	419	361	353	-	32.3	13,513	11,069	-	
Austria	(1,609)	-	-	-	32.1	(51,946)	-	-	
Czechoslovakia	2,965	-	-	-	21.9	65,077	-	-	
Poland	1,867	1,705	1,506	1,755	28.0	52,289	32,150	c/ 38,120	
France	74	191	183	163	48.2	3,570	8,325	-	
Belgium	107	114	81	99	54.7	5,858	5,176	3,307	
Netherlands	939	984	981	1,003	55.9	52,481	59,156	55,299	
Denmark	143	-	-	-	38.2	5,467	-	-	
Norway	252	280	235	(245)	39.5	9,951	10,684	(8,500)	
Sweden	305	264	334	-	27.8	8,478	6,600	-	
Finland	539	-	-	-	28.2	15,174	-	-	
Bulgaria	1,163	-	-	-	25.8	30,178	-	-	
Hungary	3,533	-	-	-	13.3	46,861	-	-	
Romania	1,036	-	-	-	17.9	18,619	-	-	
Yugoslavia	511	-	-	-	18.1	9,267	-	-	
Greece	456	-	-	-	20.8	9,470	-	-	
Latvia	530	-	-	-	22.5	11,944	-	-	
Lithuania	230	-	-	-	17.8	4,100	-	-	
Estonia	-	-	-	-	-	-	-	-	
Estimated total	26,590	25,270	24,320	24,370	-	718,800	675,000	565,000	

Soviet Union.....	22,528	-	-	-	-	15.4	d/350,000	-	-	-	-
Africa:											
French Morocco.....	4,448	4,312	4,230	3,751	12.0	53,279	45,869	31,094	10,100		
Algeria.....	3,051	2,697	2,461	2,182	10.9	33,132	34,447	(22,500)	6,200		
Tunisia.....	1,182	1,023	1,077	1,463	7.7	9,048	8,267	5,149	5,741		
Egypt.....	275	435	344	372	38.8	10,697	14,442	10,417	12,015		
Estimated total....	10,300	9,800	9,600	9,100	-	120,000	117,000	85,000	46,000		
Asia:											
Turkey.....	4,592	3,683	4,090	4,703	20.9	96,129	76,487	64,441	45,109		
India.....	6,298	-	-	-	16.5	103,619	-	-	-		
Syria & Lebanon....	793	618	-	-	19.4	15,386	15,179	10,844	-		
Japan.....	1,889	-	-	-	38.7	73,149	-	-	-		
Chosen.....	2,670	-	-	-	20.7	55,220	-	-	-		
China.....	(15,772)	-	-	-	21.8	343,158	-	-	-		
Iran.....	(1,545)	(1,977)	1,730	-	23.1	35,728	(45,900)	57,871	68,894		
Iraq.....	1,934	(1,875)	1,984	-	16.4	31,677	27,558	20,668	(21,000)		
Palestine.....	571	364	364	(450)	5.7	3,238	2,573	1,608	(3,400)		
Manchuria.....	222	-	-	-	29.1	6,462	-	-	-		
Estimated total....	36,500	-	-	-	-	768,300	-	-	-		
Other Countries:											
Argentina.....	1,286	1,310	962	(1,400)	17.6	22,586	33,005	26,308	(30,000)		
Chile.....	184	117	(132)	-	27.4	5,041	3,514	3,593	-		
Uruguay.....	40	60	54	-	15.0	600	1,085	693	-		
Australia.....	648	443	-	-	18.0	11,651	7,830	4,375	(9,000)		
New Zealand.....	24	28	-	-	39.7	952	867	1,350	(1,300)		
Estimated world total....	114,120	109,650	106,000	106,400	-	12,335,000	12,300,000	12,150,000	12,025,000		

Compiled from official sources and the International Institute of Agriculture, where available; otherwise Office of Foreign Agricultural Relations estimates (shown in parentheses) based on foreign service reports and other information.

a/ Years shown refer to year of harvest. Harvests of the Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately follow; thus, the crop harvested in the Northern Hemisphere in 1944 is combined with the Southern Hemisphere harvest which began late in 1944 and ended early in 1945. b/ Figures refer to harvested areas as far as possible. c/ Official estimates adjusted to include Alsace Lorraine. d/ Official estimates adjusted to take account of harvest losses.

Notes: Acreage, yield per acre and production in specified countries, average 1935-39.

Soviet Union.....	40,089	-	-	-	-	25.8	1,025,000	-	-	-
Other Countries:										
Turkey.....	636	710	648	745	26.6	16,893	18,205	12,792	8,954	
Syria & Lebanon....	24	-	-	-	27.6	662	-	-	-	
Tunisia.....	84	49	74	86	19.9	1,674	689	1,102	1,033	
Algeria.....	465	504	556	371	23.8	11,058	12,401	11,712	3,238	
French Morocco....	104	86	91	(113)	26.5	2,751	2,411	2,067	-	
Union of S. Africa..	(545)	888	-	-	12.8	6,966	7,617	10,416	-	
Argentina.....	1,974	2,637	2,564	(2,600)	27.1	50,182	63,713	75,694	(75,000)	
Chile.....	279	260	302	-	27.5	7,670	7,865	8,867	-	
Uruguay.....	213	402	155	-	14.6	3,100	5,364	1,815	-	
Australia.....	1,593	1,414	-	-	14.7	23,351	22,125	10,000	(15,000)	
New Zealand.....	63	40	40	-	56.2	3,539	2,293	(2,530)	(3,000)	
Japan.....	(312)	-	-	-	37.5	(11,708)	-	-	-	
Chosen.....	(239)	-	-	-	11.4	(2,724)	-	-	-	
China.....	(2,582)	-	-	-	23.4	(50,317)	-	-	-	

Estimated world total: 138,800 134,530 132,800 137,250 - 14,369,000 14,100,000 14,080,000 14,300,000
 Compiled from official sources and the International Institute of Agriculture, where available; otherwise
 Office of Foreign Agricultural Relations estimates (shown in parentheses) based on foreign service reports
 and other information.

Years shown refer to year of harvest.

- a/ Harvests of the Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately follow; thus, the crop harvested in the Northern Hemisphere in 1944 is combined with the Southern Hemisphere harvest which began late in 1944 and ended early in 1945.
- b/ Figures refer to harvested areas as far as possible.
- c/ Official estimates adjusted to include Alsace Lorraine.
- d/ Official estimates adjusted to take account of harvest losses.

In view of the very short crops harvested last year in the Southern Hemisphere, notably barley in Australia and Argentina, some gains may be reasonably expected to be recorded in 1945. A good outturn of barley in Argentina would greatly help the export situation for this grain in the first half of 1946. Oats may show little change from last year, however, as the 1944 crop was reported as not generally affected by the drought.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the OFAR Committee on Foreign Crop and Live-stock Statistics. For this report the Committee was composed of Joseph A. Becker, chairman, C. M. Purves, Gordon P. Boals, Judith E. Downey, Victor B. Sullam, and A. H. Lester.

WORLD FLAXSEED PRODUCTION LARGER THAN IN 1944

World flaxseed production in 1945 will exceed that of last season when the output was the smallest it has been in more than a decade, following a record harvest in 1943. In the Northern Hemisphere countries, production is forecast at 96 million bushels, compared with 87 million last year and the 1935-1939 average of 73 million. When allowance is made for the Southern Hemisphere crops at average yields per acre and acreage slightly less than prewar, world production for 1945 is forecast at 150 million bushels. This compares with 124 million in 1944, 191 million in 1943, and the prewar average of 137 million.

The United States, India, and Mexico report larger crops, while Canada's outturn is 26 percent smaller than in 1944. Production throughout the European Continent is expected to fall below that of recent years, especially during the years of German occupation. Total production in Africa will be much smaller than average. Egypt harvested the shortest crop since 1937, and drought was severe in Morocco.

Countries of the Southern Hemisphere will not begin to harvest until November. Since Argentina is the largest producer of flaxseed, the world total will depend upon the outcome in that country. The planted acreage is 9 percent less than the corresponding one of 1944, according to the first official estimate. If weather conditions continue favorable, however, the yield per acre should be substantially larger than last year. Uruguay and Chile probably have increased their flaxseed acreage.

United States flaxseed production for 1945 is estimated at 35.3 million bushels or about 50 percent larger than last year's outturn. The crop has successfully passed most of the possible hazards, except in the northernmost zones. Despite the heavy growth of weeds in some fields and thin stands in others, a yield of 9.1 bushels per acre is indicated, or 1 bushel larger than the 10-year (1934-1943) average.

This country's production of 35 million bushels is the fourth largest on record. In the first decade of this century and again in the 1920's, flaxseed production ranged between 20 and 25 million bushels, then declined to an average of 11 million bushels in the 1930's. The United States in the 1940's has become the world's second largest producer.

Canada's 1945 flaxseed crop, estimated at 7.4 million bushels, represents a decrease of 23 percent from last year's output and 60 percent from the 1943 harvest. Flaxseed growing was greatly curtailed last year and again this year due largely to the more attractive returns from wheat, oats, and barley, all of which are competitive crops in the Prairie Provinces, where the bulk of the flaxseed is grown.

Mexico's 1945 flaxseed harvest is now estimated at 1.2 million bushels, compared with 985,000 last year. In relation to other oilseed crops, flaxseed played a minor role until 1941. In the 5 years preceding the war, production averaged about 125,000 bushels. The first marked rise occurred in 1942 as a result of offers of large contracts by vegetable oil producers on the Pacific Coast of the United States. Since then production has more than trebled, and Mexico has become an exporting country.

The Soviet Union is the largest producer and consumer of flaxseed in Europe. During the years 1935-1939, production averaged about 30 million bushels.

Indian flaxseed production of 15.6 million bushels is slightly more than that of last year but 14 percent less than the prewar (1935-1939) average. Prior to the outbreak of war in Europe flaxseed was produced chiefly for export, with the bulk of the shipments going to other British Empire countries and continental Europe.

Morocco's flaxseed goal for 1945 was 90,000 acres. This ambition, however, will probably not be achieved as that country experienced a severe drought. If the acreage was planted, yields were probably very low, possibly 50 to 75 percent less than normal.

Egypt's 1945 flaxseed harvest of 82,000 bushels about equals the prewar average. During the war there was a noted expansion in this crop, reaching the peak in 1942 when the outturn was 543,000 bushels. In the 2 years following there was a decrease of more than 40 percent, and the sharp decline of the current season is due to the Government's increase in the price of wheat without a comparable one for flaxseed.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the OFAR Committee on Foreign Crop and Livestock Statistics. For this report the Committee was composed of Joseph A. Becker, chairman, C. M. Purves, Fred J. Rossiter, Regina H. Boyle, Helen Francis and Allen H. Lester.

Flaxseed: Acreage and production in specified areas, year of harvest, averages 1930-34 and 1935-39, annual 1943-1945 a/

Continent and country	Acreage			Production		
	Average 1930-34	1935-39	1943	1944	1945 b/	1945 b/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 bushels	1,000 bushels
North America:						
United States.....	2,108	1,451	5,847	2,794	3,863	35,345
Canada.....	432	307	2,948	1,323	1,059	7,397
Mexico.....	9	16	105	(125)	(140)	(1,181)
Estimated total	2,600	1,800	9,000	4,300	5,100	44,000
Europe:						
Poland d/.....	253	e/ 340			1,974 e/ 2,817	f/ 2,157
Lithuania d/.....	143	205			1,009	1,358
Latvia d/.....	105	164			533	801
Rumania d/.....	55	54			415	339
Estonia d/.....	51	66	62		288	366
France d/.....	44	92	121	104	363	464
Belgium d/.....	35	75	31	26	294	664
Hungary.....	31	19			252	283
Yugoslavia d/.....	29	33			37	52
Czechoslovakia d/.....	22	e/ 40			127 e/ 289	
Germany d/.....	18	e/ 105			e/ 187 e/ 1,123	
Netherlands d/.....	17	42	37		175	546
Italy.....	14	16			139	202
Austria.....	4	5			24 e/ 29	
Bulgaria d/.....	1	8			10	52
Estimated total	850	1,300	1,200	1,200	950	10,500
Soviet Union d/.....	6,726	e/ 5,805			29,865 e/ 29,526	
Asia:						
India b/ d/.....	3,296	3,885				15,240
Turkey d/.....	32	48			17,064	e/ 15,240
Japan d/.....	27	e/ 45			176	637
Cyprus d/.....	2	2			131 e/ 189	
Estimated total ex- cluding China	3,400	4,000	3,500	3,600	3,550	17,000
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Compiled from official sources and publications of the International Institute of Agriculture and includes Office of Foreign Agricultural Relations estimates (shown in parentheses) based on foreign service reports and other information.

a/ Harvests of the Northern Hemisphere countries are combined with those of the Southern Hemisphere which immediately follow; thus, the crop harvested in the Northern Hemisphere countries in 1944 is combined with the Southern Hemisphere harvest which began late in 1944 and ended early in 1945.

b/ Preliminary.

Revised.

d/ Acreege includes area for fiber.

Average of less than 5 years.

Average of 1000 values.
Unofficial estimate.

1/2

19/9
18003
18001

Officially reported production plus Indian official estimates for unreported tracts except in 1943, 1944, and 1945, when no estimates for unreported tracts were available.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDS
**CANADIAN GRAIN
PRODUCTION REDUCED**

The 1945 Canadian grain harvest is considerably smaller than the large production last year, according to the first official estimate. The reduction in grain outturns was due to unfavorable weather conditions, particularly drought and high temperatures. Seedings were slightly larger than in 1944, for all grains except rye. The wheat crop is placed at 321,409,000 bushels, or about 114 million bushels less than the 1944 crop. The indicated yield of 13.7 bushels per seeded acre is the smallest yield since 1937. The wheat estimate includes a total of 297 million bushels in the Prairie Provinces and 21.4 million bushels, mostly winter wheat, in Ontario. This year's production of durum was estimated at 5.9 million bushels, compared with about 11 million bushels last year.

CANADA: Acreage and production of principal grains,
average 1938-1942, annual 1943-1945

Crop	Average 1938-1942	1943	1944	1945
	<u>1,000 acres</u>	<u>1,000 acres</u>	<u>1,000 acres</u>	<u>1,000 acres</u>
Acreage				
Wheat.....				
Fall.....	715	601	668	675
Spring.....	24,261	16,249	22,516	22,739
Total.....	24,976	16,850	23,284	23,414
Oats.....	12,328	15,407	14,315	14,393
Barley.....	5,083	8,397	7,291	7,350
Rye.....	1,035	576	648	487
Production				
Wheat				
Fall.....	20,526	13,222	20,908	20,655
Spring.....	437,940	271,238	414,627	300,754
Total.....				
	a/ 458,466	284,460	435,535	321,409
Oats b/.....	418,769	482,022	499,643	388,289
Barley.....	135,873	215,562	194,712	161,135
Rye.....	15,346	7,143	8,526	6,452

From official sources.

a/ Production during this period was considerably above the 1935-1939 prewar average of 312 million bushels.

b/ Production reported in bushels of 34 pounds.

The production of oats was estimated to be about 111 million bushels less than in 1944. Lower yields, as in the case of wheat, account for the reduction. The barley crop is moderately lower than a year ago, with acreage slightly larger. In contrast with other grains, rye yielded about the same volume per acre as in 1944; a considerable reduction in acreage, however, brought the total production down by about 25 percent.

Widespread drought conditions in the Prairie Provinces, particularly in southern and western Saskatchewan and in eastern Alberta, reduced yields. Feed grains, especially oats, were adversely affected. The best stands of grain this year were reported in Manitoba and in eastern and northern Saskatchewan. Owing to the late, cold spring, grain crops were very backward, and an early frost could also have caused considerable damage. The hot weather which prevailed over a considerable part of the grain area during the latter part of August, however, hastened maturity, and no general killing frost has been reported to date (mid-September).

DROUGHT CAUSES SMALL RICE CROP IN SPAIN

The 1945 rice crop in Spain is unofficially forecast at 6.9 million bushels, or about 60 percent of the official estimate of 11.7 million last year. Dry weather caused the decline in production this year, but a lack of fertilizers has continued to be mainly responsible for the large reduction in yields which started during the Civil War in 1935. The average outturn in Spain of 128 bushels per acre in 1926 was probably a record rice yield for the world.

SPAIN: Rice acreage, production, trade, and apparent utilization, average 1930-1934 annual for specified years

Year	: Acreage	: Yield : per acre	: Production : Rough : Milled	: Imports : a/ b/	: Exports : a/ b/	: Apparent a/ : utilization	: b/
	: 1,000	:	: 1,000 : Million	: Million	: Million	: Million	
	: acres	: Bushels	: bushels : pounds	: pounds	: pounds	: pounds	
Average:	:	:	:	:	:	:	:
1930-1934..	117	: 124.4	: 14,558 : 426	: c/	: 70	: 356	
Annual	:	:	:	:	:	:	:
1939.....	106	: 82.3	: 8,726 : 255	: 122	: 23	: 354	
1940.....	135	: 97.5	: 13,167 : 385	: 33	: 0	: 418	
1944.....	118	: 99.3	: 11,717 : 343	:	:	:	:
1945 d/...	116	: 59.5	: 6,900 : 202	:	:	:	:
	:	:	:	:	:	:	:

Compiled from official sources, except as noted.

a/ In terms of milled rice equivalent to 65 percent of rough rice.

b/ For calendar year following harvest.

c/ Less than 500,000 pounds.

d/ Unofficial.

LATIN AMERICAN RICE HELPS RELIEVE CUBAN SHORTAGE

Rice shipments from Latin American countries during August, together with those from the United States, helped to relieve the current rice shortage in Cuba. Of the August imports totaling 16 million pounds, 10 million came from Latin America and 6 million from the United States. The Latin American arrivals consisted of 6 million pounds from Ecuador, 2.5 million from Chile, and 1.1 million from the Dominican Republic. Speculation in rice was less serious than originally forecast as a result of strict Government supervision and prospects of relatively large new-crop imports from the United States beginning in late September. The Cuban trade, according to present indications, would probably buy as much as 500 million pounds of the 1945 United States rice crop if it were available.

FATS AND OILS

SMALL OLIVE OIL CROP FORECAST IN TUNISIA

The 1945-46 preliminary forecast for olive oil production in Tunisia is 22,000 short tons, as compared with an estimated 82,500 tons^{a/} in 1944-45 and 38,500 tons in 1943-44. The forecast is only about 51 percent of the 5-year (1939-1943) average and 49 percent of the 10-year (1934-1943) average. It is the smallest production estimate since 1940-41 when only 17,600 tons were produced.

TUNISIA: Estimated production, edible olive oil,
1945-46 with comparisons
(Rounded to nearest 100 short tons)

Year	Production
	Short tons
Average	
1939-1943.....	43,000
1934-1943.....	44,700
Annual	
1942-43.....	55,000
1943-44.....	38,500
1944-45..... ^{a/}	82,500
1945-46..... ^{b/}	22,000

Compiled from trade and official sources.

^{a/} Preliminary revised. ^{b/} Preliminary forecast.

In contrast with the present forecast, the 1944-45 olive crop was the largest on record for Tunisia, and estimates of probable olive oil production were high. At the start of last season, however, olive oil producers were greatly concerned over the lack of adequate storage space. This problem, in general, was solved in a satisfactory manner by various emergency

measures. When the season ended, the quantity of oil entering legitimate marketing channels was not found to have come up to earlier predictions, and a downward revision was made in the estimates. A very large quantity of oil is believed to have entered black market channels. The official estimates, therefore, are considered to be on the low side.

This year's set of olives is considerably smaller than normal which was to be expected in view of the heavy crop last year. In addition to the natural light set, the drought of spring and summer further reduced fruiting. Reports indicate that in the important SFAX region the set is particularly light.

There will probably be little, if any, olive oil available for export, according to forecast indications, since domestic requirements estimated at 33,000 short tons annually are in excess of this season's small output. Other cheaper edible oils, if available, may possibly be imported, and a limited quantity of the more expensive olive oils may be exported for the purpose of obtaining foreign exchange. At present, however, there are many unpredictable factors to such a course of action, one being a world wide shortage of fats and oils, which at best would make cheaper oils available for import difficult to obtain.

COTTON AND OTHER FIBERS

PERU'S COTTON CROP EQUALS 1944
LEVEL; SALES SLOW, EXPORTS UP

The 1945 cotton crop in Peru is estimated by the Cotton Chamber at about 297,000 bales (of 478 pounds), or nearly equal to the revised estimate of 310,000 bales for 1944. The 1945 acreage also is roughly the same at 326,000 acres.

Sales have been rather slow this year, totaling only 47,000 bales during the first 5 months of 1945, compared with 71,000 for a similar period in 1944 and 53,000 in 1943. Sales of cotton from the 1944 crop totaled 303,000 bales as of May 31, 1945, indicating that practically all of last year's crop had passed from the hands of producers at that time. Tanguis cotton represented 83.3 percent of the 303,000 bales and Pima 15.8 percent.

Stocks of cotton in Peruvian ports on July 19, 1945, were equivalent to 370,000 bales (or 478 pounds net). The bulk of this stock, however, was already sold abroad and was awaiting shipment. Mill and other stocks, normally, do not exceed about 10,000 bales as practically all the cotton mills are located in or near the seaports and operate entirely on Peruvian cotton.

Exports during the first 8 months of 1945 totaled about 125,000 bales (of 500 pounds gross), compared with 70,000 for a similar period in 1944.

The 1945 trade included exports of 15,000, 10,000, and 9,000 bales, respectively, to Switzerland, India, and Venezuela, whereas no cotton was exported to these countries in 1944. Also, exports to the United States, Colombia, and Cuba were increased considerably to 21,000, 12,000, and 6,000 bales, respectively, while those to the United Kingdom were nearly equal to the 23,000 bales exported in 1944. Domestic mill consumption is being maintained at the 1944 level of about 53,000 bales annually.

WEEKLY COTTON PRICES ON FOREIGN MARKETS

The following table shows certain cotton price quotations on foreign markets, converted at current rates of exchange.

COTTON: Price of certain foreign growths
and qualities in specified markets

Market location, kind and quality	Date: 1945	Unit of weight	Unit of currency	Price in: foreign currency	Equivalent U. S. cents per pound
Alexandria (spot)	:	: Kantar	:	:	:
Ashmouni, F.G.F.....	9-6:	99.05 lbs.	: Tallaris	35.50	29.57
Giza 7, F.G.F.....	9-6:	99.05 lbs.	: Tallaris	Not quoted	
Karnak, F.G.F.....	9-6:	99.05 lbs.	: Tallaris	39.00	32.49
Bombay (Sept '45 futures)	:	: Candy	:	:	:
Jarila.....	9-7:	784 lbs.	: Rupee	350.00	13.45
Bombay (spot)	:	: Candy	:	:	:
Kampala, East African...	9-7:	784 lbs.	: Rupee	850.00	32.66
Buenos Aires (spot)	:	: Metric ton	:	:	:
Type B.....	9-8:	2204.6 lbs.	: Peso	1300.00	17.56
Lima (spot)	:	: Sp. Quintal	:	:	:
Tanguis, Type 5.....	9-8:	101.4 lbs.	: Sol.	103.00	15.63
Recife (spot)	:	: Arroba	:	:	:
Mata, Type 5.....	9-7:	33.07 lbs.	: Cruzeiro	86.00	14.16
Sertao, Type 5.....	9-7:	33.07 lbs.	: Cruzeiro	83.00	13.63
Sao Paulo (spot)	:	: Arroba	:	:	:
Sao Paulo, Type 5.....	:	33.07 lbs.	: Cruzeiro	-	-
Torreón (spot)	:	: Sp. Quintal	:	:	:
Middling, 15/16".....	9-8:	101.4 lbs.	: Peso	85.25	17.30
	:	:	:	:	:

Compiled from weekly cables from representatives abroad.

TOBACCO

SMALLER YIELDS EXPECTED FOR ONTARIO'S FLUE-CURED TOBACCO

Smaller yields are in prospect for Ontario's 1945 flue-cured tobacco harvest. Unfavorable weather conditions which retarded development of the plants, black rot, and considerable insect damage, are the principal factors

contributing to the reduction in yields. The yields in 1945, in the opinion of most growers, will not be as heavy as those in 1944 of approximately 1,200 pounds per acre. By the first of September, about 50 percent of the Province's flue-cured crop had been harvested. The retarded plant development gave rise to fears that frost might further reduce the outturn in some areas.

The 1945 crop of Burley tobacco in Ontario is expected to be about the same as in 1944 when 12,223,000 pounds were produced.

NIGERIA GROWS FLUE-AND AIR-CURED TOBACCO

About 240 acres of flue-cured tobacco are being grown this year in Nigeria by native farmers under contract to a British concern. Yields are reported to average about 500 pounds per acre. The quality of the tobacco, poor in texture and insufficient in body, is not comparable with that produced in the United States. The same British company is also encouraging the production of air-cured leaf, with about 400 acres at present planted to this type leaf. No figures are available regarding the Colony's total production of tobacco, but the belief is that the crop is not sufficient to meet one-half the Colony's total consumption requirements.

During the period 1939-1943, Nigeria imported an average of 2,292,000 pounds of leaf tobacco annually. These imports were largely of Black fat, water baler, and dark African tobacco, and flue-cured leaf from the United States. Southern Rhodesia supplied important quantities of flue-cured. There is no existing preferential tariff on imports of unmanufactured tobacco from Empire countries, and the United States, therefore, probably will continue as the most important source of the Colony's tobacco imports.

FRUITS, VEGETABLES, AND NUTS

CANADA REPORTS SMALLER POTATO CROP THIS YEAR

Canada's potato crop this year is tentatively estimated by the Dominion Bureau of Statistics in Ottawa at 71 million bushels, compared with 82 million bushels last year and the 10-year (1934-43) average of 68 million bushels.

While both planted acreage and prospective yields are lower than last year, they are slightly higher than the 10-year average. Compared with the relatively large crop last year, this season's crop is expected to show a sharp reduction in the four eastern Provinces and in Alberta. In all of the other Provinces, however, this year's crop is expected to be approximately the same as in 1944.

Because of the smaller crop the exportable supply of Canadian potatoes is likely to be substantially smaller than last season when exports to the United States amounted to approximately 9.1 million bushels of which 2.6

million bushels were certified seed potatoes and 615 million bushels table stock. The belief now is that Canadian export licenses will be granted for no more than the low duty quotas (1.5 million bushels of seed potatoes and 1 million bushels of table stock). Unless crop prospects improve this quantity is about all that can be exported if Canadian requirements are to be filled.

Recent reports indicate that crop prospects are deteriorating in the Maritime Provinces, the principal surplus-producing areas. Because of this situation, no export permits have been issued this season to date and none probably will be issued until the size of the crop is more definitely determined and until there are assurances that sufficient supplies will be available to cover Canadian requirements.

The Canadian Government does not have a price-supporting program in effect this year, but it does maintain a price ceiling. The base ceiling for the September-October period is \$1.37 per 75-pound bag of Canada No. 1 grade, f.o.b. Grand Falls, New Brunswick. The ceiling is 30 cents higher for Canada No. 1 large and 15 cents lower for Canada No. 1 small. The base ceiling price is equivalent to \$1.56 (U. S. Currency) per 100 pounds, or about \$2.08, freight and duty paid to nearby U. S. markets.

CANADIAN APPLE CROP SMALLEST ON RECORD

Canadian apple production in 1945 is now estimated at 7,626,000 bushels, or 57 percent less than the 1944 record production of 17,829,000 bushels. Declines in production occur principally in eastern Provinces, while British Columbia has a normal crop of around 5.8 million bushels. Of this quantity, the McIntosh variety will constitute slightly more than 2 million bushels and Delicious slightly more than 1 million. The 1944 apple crop was the largest ever produced in Canada. The quantity processed was nearly equal to the peak level of the 1939 season, and more fresh fruit remained for domestic consumption than in any previous season on record.

CANADA: Disposition of the apple crop, average 1934-1939, annual 1939, 1941-1944

Season	Production	Fresh Exports	Processed	Fresh Consumption
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
Average				
1934-1938...	14,093	6,483	1,965	5,645
Annual				
1939.....	16,415	4,021	5,832	6,562
1941.....	10,725	1,792	3,592	5,341
1942.....	12,982	760	4,293	7,929
1943.....	12,854	999	4,542	7,313
1944.....	17,829	3,930	5,680	8,219

Compiled from official sources.

Exports of the 1944 crop of Canadian apples amounted to 3,930,000 bushels, four times greater than those of the previous year. Of these exports, 2,576,000 bushels or 66 percent went to the United States, and 1 million went to the United Kingdom. Exports to the United States were in accordance with recommendations made at the annual meeting of the Joint Apple Committee in Chicago in August 1944.

EIRE'S APPLE

PRODUCTION SMALLEST ON RECORD

Production of apples, the only fruit cultivated on a commercial scale in Eire, will be the lightest on record. Frost at the end of April and May did considerable damage. Because of the small crop, the Government issued a decree on August 18, 1945, revoking the Order of 1938, regulating the quantitative control of apple imports, and suspended the import duty applicable during the period September 1, 1945, to July 15, 1946.

LIVESTOCK AND ANIMAL PRODUCTS

CUBAN MILK

PRODUCTION IMPROVES

Following rains in June and consequent improvement in pastures, the seasonal increase in milk production in Cuba has now attained a point of sufficiency to meet requirements in the form of whole milk and cheese, but supplies of butter and canned milk remain short. The urgent need for canned milk imports, principally from the United States, according to present indications, will continue throughout 1945 and into the first months of 1946. By the second half of 1946, providing that Cuba does not experience another severe drought, the output of all dairy products may be large enough to meet Cuban requirements.

During the drought in the spring months, Cuba's worst in 86 years, milk production declined so sharply that serious shortages occurred in all urban areas and very little milk was available for the manufacture of dairy products.

While milk production has recently increased in Cuba as a result of better pasture conditions, it is reported still to be about 40 percent less than the record level of 1941. Production henceforth is expected to continue an upward trend, but the 1941 level may not be reached again for several years. Cattle numbers in Cuba in 1945 were 29 percent below those of the census of 1940, that is, 3,778,000 head as compared with 5,335,000. In the intervening years, there was a heavy slaughter for beef of dual-purpose animals, the principal type kept for milk. Both the Government and the cattlemen may inaugurate plans to promote an increase in herds.

Condensed and evaporated milk is currently in short supply following a serious slump in production during the first 6 months of 1945. During that period, the output totaled 102,875,000 pounds, as compared with

160,586,000 pounds in the corresponding semester of 1944. In April of this year, 2 of Cuba's 3 condenseries suspended manufacture because of a lack of milk but resumed operation in May.

The Office of Price Regulation and Supply recently ordered the condenseries to carry over about 20 percent of their production for use during the next dry season, beginning about the first of 1946. This action will raise reserve stocks to about 36 million pounds. Production for the entire year is expected to be about 24,361,000 pounds or about 18 percent less than 1944 and 56 percent less than 1941. The condensed and evaporated milk output in 1941 totaled more than 54,874,000 pounds.

Canned milk supplies in recent months have not been large enough to satisfy more than about 60 percent of the demand. As a result of greater purchasing power and limited supplies of fresh milk, requirements of condensed and evaporated milk during the war have risen from approximately 3 million pounds monthly to 4 million pounds. Thus the need for substantial imports, principally from the United States, is expected to continue until early 1946.

Butter production this year will probably reach 2 million pounds, about 1 million pounds smaller than the level of a year earlier and only about one-third of the estimated current demand. Two large manufacturers who formerly made about 90 percent of Cuba's butter will manufacture only about one-half of the 1945 output. Small plants, which are alleged to be selling in the black market at twice the official price ceilings and hence are able to obtain butterfat more readily, will account for the production of the balance. There are no stocks of butter in Cuba at present.

Cheese consumption in Cuba currently equals the rate of production, that is, about 500,000 pounds per month. No stocks have accumulated.